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World Production and Trade

United States
Department of
Agriculture

Foreign Agricultural Service

Washington, D.C. 20250

Weekly Roundup

WR 30-86

July 30, 1986

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade.

TRADE NOTES

MEXICO Joins the GATT. According to FAS' International Trade Policy Division, Mexico became the 92nd country to join the General Agreement on Tariffs and Trade (GATT) when it signed the agreement on July 25. The GATT is the international agreement which sets out trading rules by which signatory countries agree to abide, including granting each other non-discriminatory treatment, limiting the use of export subsidies and nontariff import barriers and negotiating limits on the level of import duties. Mexico's membership was approved after a review of a protocol which specifies concessions that Mexico proposes to accept. Until the signing, Mexico was the United State's largest trading partner not in the GATT. Mexico's membership will take effect 30 days after signature, in time for Mexico to participate in the new round of multilateral trade negotiations to begin in Punta del Este, Uruguay in September.

GRAIN AND FEED

PAKISTAN to Export Wheat. Pakistan, a traditional wheat importing country, appears likely to export wheat in 1986/87, as record supplies from large carryover stocks and another bumper crop create storage problems. After importing an average of 1.3 million tons in 1984/85 and 1985/86, an initial export goal of 500,000 tons has been announced for 1986/87, with Iran considered a likely market. Pakistan exported 50-200,000 tons of wheat per year to Iran from 1982 through 1985. To compete with Iran's traditional import suppliers--Australia, Canada, Argentina and the European Community (EC)--Pakistan probably will have to subsidize its wheat sales or negotiate barter arrangements. Iranian imports from Pakistan might displace wheat from foreign competitors which could enter the market and increase competition for U.S. wheat.

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Export Enhancement Bids Accepted for ZAIRE, BENIN and ISRAEL. During the week of July 21, 34,000 tons of wheat flour and 45,000 tons of soft red winter wheat were accepted under the Export Enhancement Program (EEP) for export to Zaire. The flour sold at \$194.00 per ton c.i.f., and the wheat sold at \$82.00 per ton free on board (f.o.b.). Another 10,000-ton wheat sale to Benin was approved for soft red winter wheat which sold at \$75.00 per ton f.o.b. A 5,200-ton barley sale to Israel was approved at a price of \$52.00 per ton f.o.b. 35
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JAPANESE Producer Wheat Price Declines. A small cut in the Japanese producer wheat price could be a government signal to discourage further expansion in wheat production and could be the first step in a policy change which would eventually result in larger wheat imports. The 1.16-percent reduction, the first decline in 27 years, is attributed to lower production costs, particularly lower petroleum costs. There also have been reports that the Japanese Ministry may discuss lowering the price of imported wheat sold to millers. Any decline in this price is expected to stimulate demand which could mean increased wheat imports in this important U.S. market. Japan imports nearly 6 million tons of wheat annually, about half from the United States.

OILSEEDS AND PRODUCTS

MALAYSIA Takes New Approach to Marketing Palm Oil. Malaysia is taking a new approach to marketing its palm oil by encouraging the establishment of joint ventures to process and refine the commodity in consumer countries. Malaysia hopes that such ventures will help market its palm oil more effectively. The U.S. agricultural attache in Kuala Lumpur reports that Malaysia has entered into joint partnerships for three palm oil refineries in Egypt, Pakistan and the United States. The U.S. refinery in Chicago has a projected capacity of producing 10,000 tons of palm oil and 2,000 tons of palm kernel oil a month. The Malaysian palm oil marketing agency, FELMA, plans to develop new markets in China, Iran, Turkey, Bangladesh, Taiwan, and countries in Africa, Eastern Europe and the Mediterranean region. USDA estimates Malaysian palm oil exports at 4 million tons in 1985/86 and 4.3 million tons in 1986/87.

DAIRY, LIVESTOCK AND POULTRY

FRENCH Broiler Production Could Show a Small Increase in 1986. Broiler production in France is forecast at 790,000 tons in 1986, an increase of about 1 percent, according to the U.S. agricultural counselor in Paris. However, production is still below the previous record of 799,000 tons produced in 1983. Despite lower feed prices, production continues to be limited by declining exports and slow growth in domestic utilization.

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IRAQI Poultry Sector Expected to Grow. Iraq's poultry industry is expected to show rapid growth again in 1986, according to the U.S. agricultural attache in Baghdad. Output of broilers is forecast at 285,000 tons in 1986, up 25 percent, while egg output is expected to increase 40 percent, reaching 1.9 billion eggs. Broiler production is largely in the hands of private producers who are being encouraged by readily available credit at low interest rates and by high prices for broilers. Egg production facilities are largely owned by the state and this year's production increase is the result of projects started in previous years. Both sectors are benefiting from government policies which have ensured that foreign exchange is available to purchase needed feed supplies.

FRENCH Livestock Production Down. The U.S. agricultural counselor in Paris reports that French livestock inventories are in decline. January 1 1987 cattle and hog numbers are projected down 1 percent and sheep down 5 percent.

Cattle numbers are expected to fall to 22.58 million head during 1986 because of heavy cow slaughter. Beef production in 1986 is estimated at 1.805 million tons, down slightly from 1985. For 1987, beef production is projected to reach 1.868 million tons as heavy cow slaughter continues. The drop in the 1987 hog inventory to 10.84 million is attributed to a continued reduction in the number of small hog farms. Pork production for 1986 is estimated at 1.622 million tons. In 1987 production is expected to fall slightly.

French sheep numbers are expected to fall to 10.64 million head by the end of this year because of unfavorable spring weather which reduced the lamb crop and caused ewe culling to rise. Sheep and goat meat production for 1986 is expected to fall 10,000 tons to 166,000 tons because of the reduced supply of lambs and lower carcass weights. For 1987, production is forecast to be up slightly.

NEW ZEALAND Livestock Production Up. The U.S. agricultural attache in Wellington reports that New Zealand's livestock inventories were above normal levels as of June because of a seven-week strike at slaughter plants. Cattle and sheep numbers were 7 and 8 percent above year-earlier levels, respectively.

New Zealand beef production for 1986 is estimated up only 2 percent to 486,000 tons, below expectations due to the strike. For 1987, production is projected to rise 14 percent to 552,000 tons. Part of this increase is due to the increased inventory and part due to increased beef production as dairy farmers place more emphasis on beef production.

Sheep meat production for 1986 is estimated at 617,000 tons, down 12 percent from 1985. For 1987, production is projected up 5 percent due both to the higher inventory and herd culling because of weak sheep meat prices.

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TOBACCO

SOUTH KOREA to Open Cigarette Market to Imports. On July 21, the Government of South Korea announced that it will open its domestic market to imports of foreign cigarettes by September. Under the new plan, foreign cigarettes may be purchased and smoked. Along with this announcement, legislation has been drafted that would transform the government-controlled Office of Monopoly into a public corporation. The policy reversal should benefit U.S. tobacco producers by increasing the consumption of U.S. cigarettes. It also could necessitate increased purchases of U.S. tobacco to improve the competitive quality of domestically produced cigarettes.

COFFEE

Coffee Production in PHILIPPINES Increases. Coffee production in the Philippines for 1986/87 is forecast to reach a record level of 1.25 million bags, 9 percent above the revised 1.15 million bags produced in the previous season, according to the U.S. agricultural counselor in Manila. Upward revisions were made for the last five years beginning with the 1982/83 crop and were attributed to a number of factors. Trees planted in the late 1970's and early 1980's are now increasingly bearing fruit, and trees seriously affected by the 1983 drought are recovering and producing again. Further, favorable weather conditions, particularly the even distribution of rainfall, have also had a positive effect on yield. The following table provides the revisions made for the Philippines in 1,000 60-kilogram bags:

-- ESTIMATES --

Crop Year	Previous	Current
1982/83	1,000	1,225
1983/84	779	973
1984/85	857	1,111
1985/86	943	1,150
1986/87 (forecast)	950	1,250

RWANDA'S 1985/86 Coffee Crop Revised Upward. The 1985/86 coffee crop in Rwanda has been revised to 600,000 (60 kilogram) bags, a record high, according to the U.S. Embassy in Kigali. The revised output is 9 percent above USDA's June 1986 estimate and 11 percent more than produced in 1984/85.

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Coffee Production in THAILAND Revised Upward. Coffee production for the years 1982/83 through 1985/86 in Thailand has been revised by the U.S. agricultural attache in Bangkok, based upon recently released official data. The following table provides these revisions in 1,000 60-kilogram bags and the current forecast.

-- ESTIMATES --

	Previous	Current
1982/83	327	324
1983/84	335	364
1984/85	420	470
1985/86	500	519
1986/87 (forecast)	500	500

SUGAR

CHINA'S 1985/86 Sugar Output More Than Expected. While China's 1986/87 sugar production forecast remains unchanged at 5.7 million tons (raw basis), the sugar production estimate for the 1985/86 production year has been revised to 5.5 million tons (raw basis), up 7 percent from the earlier projection, according to the U.S. agricultural counselor in Beijing. This outturn is 20 percent more than the 1984/85 production. The increased production for 1985/86 is attributed to greater beet production (raw material) and a higher than expected cane sugar content. The following table provides the revised estimates for 1985/86 in million tons.

	Previous	Current
Cane Sugar	4.408	4.655
Beet Sugar	.761	.880
Total Sugar	5.169	5.535

DOMINICAN REPUBLIC'S 1985/86 Sugar Output Less Than Expected. The sugarcane harvest in the Dominican Republic for 1985/86 totaled 765,000 tons (raw value), 3 percent below the May 1986 estimate and 22 percent below last year, according to the U.S. agricultural attache in Santo Domingo. Reduced production is attributed to the drought that affected the country in mid-1985 and excessive rains at harvest time. Financial difficulties within the industry also are reported to have caused the harvest to be halted sooner than planned.

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WOOD AND WOOD PRODUCTS

CHINA May Reduce Imports of Solid Wood Products. According to the U.S. agricultural counselor in Beijing, China will probably reduce imports of solid wood products in 1986 due primarily to reduced foreign exchange availability. In recent years China has significantly increased its imports of forest products, especially softwood logs. The United States has been the major supplier of these logs followed by the Soviet Union, Canada and Chile. U.S. shipments for the first five months this year were 377 million board feet, 16 percent below the January-May levels in 1985. Total U.S. exports of softwood logs to China in 1985 were valued at \$323 million, making this the second largest market for U.S. softwood logs. It is expected that China will need to continue imports of significant quantities of logs for the foreseeable future.

CREDIT NOTES

P.L. 480 Agreement Signed with KENYA. A P.L. 480 Title I sales agreement valued at \$10.0 million was signed with Kenya on July 16. The agreement provides \$7.1 million worth of wheat (approximately 55,000 tons) and \$2.9 million worth of rice (approximately 11,000 tons).

P.L. 480 Agreement Amendments Signed with SUDAN and MOROCCO. On July 16, Sudan signed an amendment to its fiscal 1986 Title I agreement for the sale and transportation of an additional \$24.0 million of agricultural commodities. The amendment covers \$14.0 million worth of wheat (about 128,000 tons) and \$6.0 million of wheat flour (about 31,600 tons), together with \$4.0 million in ocean transportation financing. This action increases the total value of the Jan. 26, 1986 agreement from \$30.0 million to \$54.0 million.

Morocco has signed an amendment to its fiscal 1986 P.L. 480 agreement for an additional \$20.0 million in commodity financing. The new agreement provides for approximately 178,000 tons of wheat and increases the total value of the Title I agreement to \$40.0 million.

P.L. 480 Purchase Authorizations Announced for GHANA, SUDAN, MOZAMBIQUE, KENYA, HAITI and SENEGAL. Ghana received purchase authorizations for cotton (\$5 million) and rice (\$1 million). Sudan's flour and wheat purchase authorizations were amended to add \$6 million for wheat flour purchases and \$14 million for wheat purchases. Mozambique's wheat and corn purchase authorizations were amended to add \$1.6 million for wheat and \$900,000 for corn. Haiti received a purchase authorization for \$5 million worth of edible vegetable oil. Senegal's rice purchase authorization was amended to add \$4 million.

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EXPORT ENHANCEMENT INITIATIVES

The status of USDA's Export Enhancement Program as of July 29, 1986, was as follows in metric tons:

ANNOUNCED INITIATIVES	DATE ANNOUNCED	QUANTITY/RESULTS
40. Canary Is. Dairy Cattle	July 28, '86	3,000 head
39. Hong Kong Table Eggs	July 28, '86	44 million
38. Senegal Wheat	July 17, '86	100,000
37. India Vegetable Oil	July 8, '86	25,000
36. Jordan Barley	June 17, '86	60,000
35. Israel Barley	June 17, '86	200,000 Sold 5,200
34. Tunisia Dairy Cattle	May 29, '86	4,000 head
33. Algeria Dairy Cattle	May 29, '86	5,000 head
32. Sri Lanka Wheat	May 16, '86	125,000 Sold 50,000
31. Saudi Arabia Barley	May 7, '86	500,000 Sold 265,000
30. Algeria Barley	Apr 17, '86	500,000
29. Morocco Dairy Cattle	Apr 16, '86	4,000 head
28. Turkey Dairy Cattle	Apr 16, '86	5,000 head
27. Egypt Dairy Cattle	Apr 16, '86	6,000 head
26. Yemen Poultry Feed	Apr 14, '86	150,000
25. Yugoslavia Wheat	Apr 10, '86	200,000 COMPLETE
	June 24, '86	200,000 Sold 120,000
24. Indonesia Dairy Cattle	Apr 9, '86	7,500 head
23. Syria Wheat	Apr 8, '86	700,000
22. Benin Wheat	Apr 7, '86	45,000 Sold 20,000
21. Algeria Table Eggs	Apr 4, '86	500 million
20. Iraq Dairy Cattle	Apr 4, '86	6,500 head
19. Jordan Wheat	Mar 19, '86	75,000 COMPLETE
	June 24, '86	75,000 COMPLETE
18. Tunisia Wheat	Mar 18, '86	300,000 Sold 50,000
17. Algeria Wheat Flour	Feb 25, '86	100,000
16. Algeria Semolina	Feb 11, '86	250,000
15. Philippines Wheat	Jan 7, '86	150,000 COMPLETE (152,400)
14. Zaire Wheat	Dec 27, '85	40,000 COMPLETE
	May 15, '86	40,000 COMPLETE
13. Nigeria Barley Malt	Dec 10, '85	100,000 Sold 4,400
12. Iraq Wheat Flour	Dec 9, '85	150,000 Sold 75,000
11. Egypt Poultry	Nov 26, '85	8,000 COMPLETE
	Mar 21, '86	15,000 COMPLETE
	June 18, '86	5,000 COMPLETE
	July 8, '86	15,000
10. Zaire Wheat Flour	Nov 18, '85	64,000 COMPLETE
	May 15, '86	30,000 Sold 15,000
9. Philippines Wheat Flour	Nov 15, '85	100,000 Sold 50,000
8. Jordan Rice	Nov 8, '85	40,000 Sold 22,700
7. Turkey Wheat	Oct 16, '85	500,000 COMPLETE (506,600)
	May 8, '86	500,000

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6. Morocco Wheat	Sept 30, '85	1,500,000	Sold 890,000
5. Yemen Wheat	Sept 6, '85	100,000	Sold 50,000
4. Yemen Wheat Flour	Aug 20, '85	50,000	Sold 31,500
	Apr 14, '86	100,000	
3. Egypt Wheat	Jul 26, '85	500,000	COMPLETE
	Oct 30, '85	500,000	COMPLETE
	June 20, '86	500,000	(512,500)
	July 29, '86	52,000	Sold 252,000
2. Egypt Wheat Flour	Jul 2, '85	600,000	COMPLETE
1. Algeria Wheat	Jun 4, '85	1,000,000	COMPLETE
	Apr 10, '86	1,000,000	

EXPORT ENHANCEMENT PROGRAM SUMMARY

Announced to Date	11,763,780 (grain equivalent) tons
	544 million table eggs
	43,000 tons frozen poultry
	41,000 head dairy cattle
	25,000 tons vegetable oil
Sold to Date	4,533,500 wheat
	1,144,635 flour, grain equivalent
	270,200 barley
	28,000 frozen poultry
	22,700 rice
	5,980 barley malt, grain equivalent
Bonus	\$294.3 million at book value (2,069,900 tons)

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TARGETED EXPORT PROMOTION PROGRAM

The status of USDA's Targeted Export Promotion Program as of July 28, 1986, was as follows with value in dollars:

DATE ANNOUNCED	COMMODITY	VALUE	COUNTRY
July 28, 1986	Dry Peas & Lentils	\$2.5 million	EC, Colombia, India
July 25, 1986	Table Grapes	\$0.35 million	Western Europe, Australia, Panama, Japan, Taiwan, Singapore, Malaysia
July 18, 1986	Washington State Apples	\$1.4 million	United Kingdom, Taiwan, Malaysia, Hong Kong, Norway, Saudi Arabia
July 17, 1986	Wood Products	\$0.6 million 1/	United Kingdom
July 16, 1986	Wheat	\$1.1 million	Developing countries
July 14, 1986	Poultry & Eggs	\$6 million	Pacific Rim, Middle East countries
June 24, 1986	Feed Grains, Soybean Meal & Dairy Cattle	\$9 million over 3 years	Algeria
June 23, 1986	Fresh & Processed Citrus produced in Florida	\$4.6 million	Western Europe & Pacific Rim
May 20, 1986	Dried Prunes	\$4 million	Western Europe
April 30, 1986	Wood	\$1.95 million (over 3 years)	Japan
April 28, 1986	Wine	\$2.3 million	Japan, United Kingdom, Hong Kong, Singapore
April 25, 1986	Almonds		Western Europe, Japan, Korea
April 17, 1986	Canned Peaches, Fruit Cocktail	\$2.5 million	Japan, Taiwan
April 16, 1986	Walnuts	\$7 million	Western Europe, Japan
April 16, 1986	Raisins	\$6.3 million	Western Europe, Pacific Rim
April 14, 1986	Fresh and Processed Citrus produced in Arizona and California		Japan, Hong Kong, Singapore, Malaysia
March 27, 1986	Frozen Potatoes	\$2 million	Japan, Hong Kong, Taiwan, Malaysia Singapore
	Total:	\$60.40 million	

1/ Part of April 30, 1986, wood TEA amount. Not included in total.

Selected International Prices

Item		July 29, 1986	Change from a week ago	A year ago
ROTTERDAM PRICES 1/		\$ per MT	\$ per bu.	\$ per MT
Wheat:				
Canadian No. 1 CWRSS-13.5%.	N.Q.	--	--	163.50
U.S. No. 2 DNS/NS: 14%....	127.00	3.46	+1.00	153.00
U.S. No. 2 S.R.W.	117.00	3.18	+1.00	132.00
U.S. No. 3 H.A.D.	126.00	3.43	+1.00	159.00
Canadian No. 1 A: Durum...	N.Q.	--	--	170.00
Feed grains:				
U.S. No. 3 Yellow Corn....	97.00	2.46	+2.00	121.50
Soybeans and meal:				
U.S. No. 2 Yellow.....	N.A.	--	--	214.00
Brazil 47/48% Soya Pellets	194.50	--	+1.50	151.00
U.S. 44% Soybean Meal.10/.	181.00	--	-3.00	144.00
U.S. FARM PRICES 3/				
Wheat.....	86.71	2.36	-1.10	105.44
Barley.....	51.44	1.12	-2.30	59.25
Corn.....	74.80	1.90	+1.97	98.43
Sorghum.....	65.48	2.97 2/	-2.43	94.80
Broilers.....	1500.45	--	-33.51	1070.77
EC IMPORT LEVIES				
Wheat 5/.....	159.70	4.35	+2.80	104.75
Barley.....	165.15	3.60	+1.55	102.90
Corn.....	156.60	4.05	-0.40	86.15
Sorghum.....	169.60	4.31	+1.70	104.95
Broilers 4/ 6/ 8/.....	354.00	--	+2.00	175.00
EC INTERVENTION PRICES 7/ 9/				
Common wheat(feed quality)	173.10	4.71	+0.60	142.15
Bread wheat (min. quality)	182.10	4.96	+0.65	152.10
Maize.....	182.10	4.63	+0.65	142.15
Barley and all other feed.				
grains, excluding maize.	173.10	--	+0.60	142.15
Broilers 4/ 6/.....	1,481.00	--	+26.00	1169.00
EC EXPORT RESTITUTIONS (subsidies)				
Wheat	N.A.	--	--	25.00
Barley.....	99.00	2.16	--	36.65
Broilers 4/ 6/ 8/.....	260.00	--	+1.00	103.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ Changes may be due partly to exchange rate fluctuations and/or ECU payments. 10/ September delivery. N.A.=None authorized. N.Q.=Not quoted. Note: Basis August delivery.

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